

# CanadaHelps

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Annual Report  
2012 -2013

# CanadaHelps

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## Annual Report 2012 -2013

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# CanadaHelps' Mission, Vision, Values & Principles

## Our Vision

CanadaHelps strives to build a caring and involved Canadian society that is committed to giving and participating effectively in the charitable sector, using technology to create an efficient connection between charities, donors, and the corporate community.

## Mission

CanadaHelps engages Canadians in the charitable sector, providing accessible and affordable online technology to both donors and charities to promote – and ultimately increase – charitable giving in Canada.

## Values & Principles

### Donors & Donor Service

- We believe that an informed donor is a wise donor.

CanadaHelps works toward educating donors on best practises, trends in the charitable sector, and philanthropy in general.

We provide donors with the tools to stay in charge of their philanthropic giving.

**Technology & Leadership** - CanadaHelps is innovative in its adoption and use of online applications and new technologies; we are agile, nimble, and responsive to new opportunities. We hire and retain exceptional and talented staff, and create a workplace that fosters innovation, creativity, and productivity.

**Research & Education** - CanadaHelps is a learning organization, staying in touch with charitable sector trends, donor and charity needs, and working to provide solutions that anticipate these needs. We work to promote our own work, and to encourage and inspire greater philanthropic giving in Canada.

### Accessibility, Ease-of-Use, & Efficiency

- CanadaHelps provides services that make online charitable giving easy and secure for donors, and accessible and cost-effective for charities.

**Charities & Charity Service** - CanadaHelps works with organizations registered with the Canada Revenue Agency to help them focus their time and resources on their missions, not administration. We operate neutrally and support the good work of charitable organizations in Canada.

**Integrity & Accountability** - CanadaHelps is accountable, transparent, and ethical, practising strong fiscal management along with transparent reporting of our financial affairs and activities.

**Partnership & Collaboration** - CanadaHelps seeks opportunities to work with groups from all sectors to provide greater options to both donors and charities.

# Message from the CEO & Chair



Looking back at the 2012-2013 fiscal year, it was a year full of excitement and transition for CanadaHelps. We were thrilled to add over 1,000 charities as clients this fiscal, and we continued to work hard to provide more than 12,000 charity clients with essential low-cost, online fundraising tools. By using CanadaHelps' services, charities are saving countless hours in administrative work and money with our low rates, and reaching new donors from across the country.

Our reach was evident this year with more than 200,000 Canadians donating through our platform. We were pleased to see donations through CanadaHelps grow by 15% this fiscal year.

At the end of 2012, CanadaHelps said goodbye to its former CEO, Owen Charters, who had led the organization for six years. We thank Owen for his dedication and years of service. With the strong organizational foundation already in place, CanadaHelps' new leader, Marina Glogovac, joined the team in May of 2013.

Marina is a seasoned leader and visionary, with over 20 years' experience in consumer technology, eCommerce, multi-channel marketing, brand building, sales and partnership, and award-winning content development. Marina is passionate about the charitable sector, and has contributed her expertise to a number of not-for-profit organizations, including serving on boards or advisory committees.

We're looking forward to the next phase of CanadaHelps life where we can bring together the technology expertise from the private sector with our established commitment to and understanding of the needs of Canadian charities. The world of donating and fundraising is changing and evolving rapidly and, in the year to come, we'll continue to find new ways to make giving even easier for both Canadian donors and charities, most notably delivering enhanced engagement and educational services and an enhanced Peer to Peer (Crowdfunding) solution.

We have an affinity for small and medium-sized charities, and understand the fundraising challenges they face. We are committed to offering an even fuller suite of fundraising solutions for charities, and an even better tools and resources for Canadians that will continue to inspire them to act charitably in all aspects of their lives.

We look forward to the coming year and next chapter of the CanadaHelps story.

Handwritten signature of Patrick Johnston in black ink.

**Patrick Johnston**  
Chair, Board of Directors

Handwritten signature of Marina Glogovac in black ink.

**Marina Glogovac**  
President & CEO

# Management Report Fiscal Year 2013 Summary



[DONATE NOW >](#)

In the past 12 months, we have seen tremendous growth in numerous areas. We saw a 9.44% increase in the number of charities registering for our services from the previous year, and we also saw growth of 7.62% in the number of Canadians donating to charity through CanadaHelps. As of June 30, 2013 CanadaHelps is pleased to have facilitated over \$300 million in donations for small and medium sized charities across Canada, with over \$72 million in fiscal year 2013 alone.

Further investment in our technology team this past year led to two new product launches. In December 2012 we launched a new product for our charity clients – Custom Donate Now Pages with tremendous results. Custom Donate Now was rolled out to all of the CanadaHelps’ charity partners in August. These customizable and brandable donation forms give charities more control over the look and feel of their donation path on CanadaHelps. Charities are able to adjust page settings to suit their fundraising needs, all while maintaining the same level of security that has protected CanadaHelps’ donors and charities since 2000. Donors are increasingly giving from their phones and tablets, which is why we ensured our Custom Donate Now forms are fully mobile-optimized. This feature has been a success. We’ve received very positive feedback both from charities and donors, and also seen an increase in donations.

We also expanded our offerings to Canadian donors by introducing the CanadaHelps Crisis Relief Centre. This is a go-to destination for giving during humanitarian disasters that provides access to the latest news, and provides a curated list that donors can trust of registered Canadian charities – large and small – that are providing relief. Donors can visit the site, quickly identify the type of relief each charity is providing, select the effort they would like to support, and easily and securely donate online with confidence that their gift is going to the right place.

Many additional enhancements and brand new features are in our development for the coming year. We are looking forward to providing more tools to charities and donors in order to make giving even simpler, and increase giving in Canada.

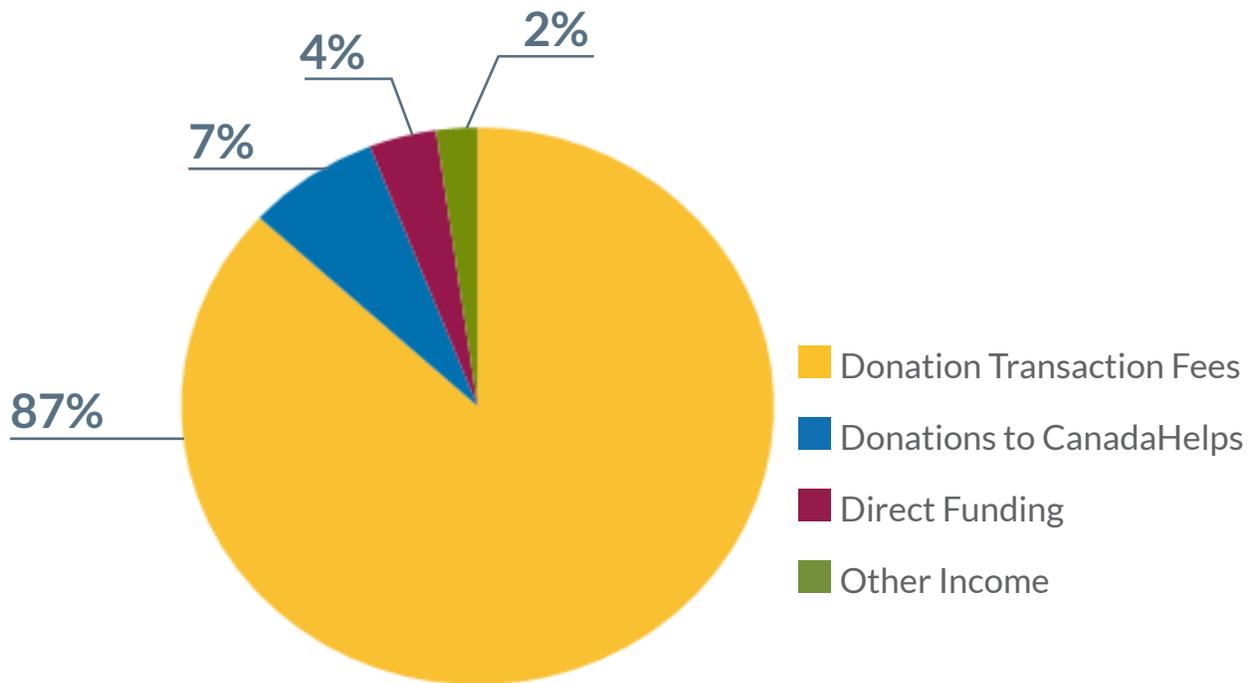
# 2012-2013 Operating Budget



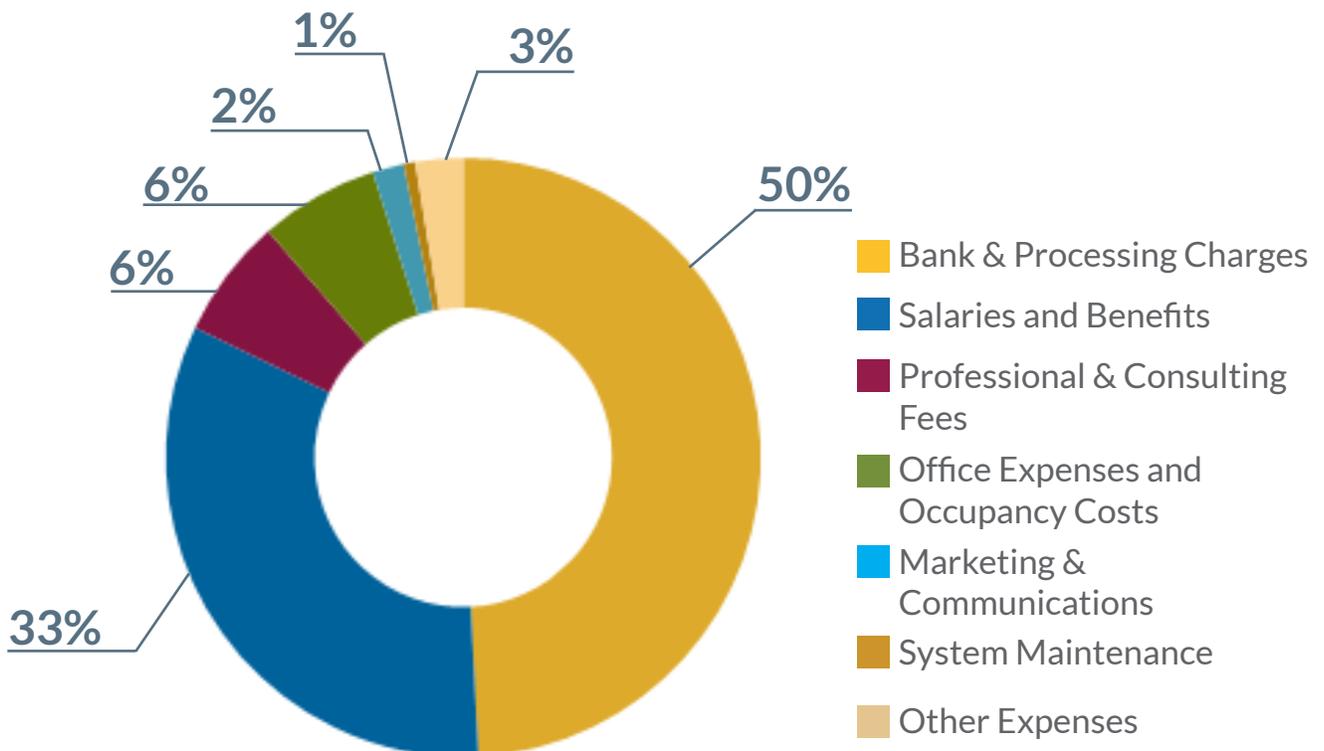
CanadaHelps had a successful fiscal year. Donations through CanadaHelps grew by 15% and our overall operating revenues grew by 10% from last fiscal year. We exceeded our donation target by 4% and surpassed our budgeted operating revenues by 6%. Due to some staff turnover and operational efficiencies, the total expenses were less than budgeted by 3%. Overall, we produced a surplus, which will be re-invested into the 2013-2014 operating budget, where we expect to increase the size of our staff and invest heavily in our technology platform to better serve both donors and charities to increase our impact.

Fiscal 2012 - 2013	Approved Budget	Actuals	% Variance
Donations through CanadaHelps	\$69,115,518	\$71,998,994	4%
<b>REVENUE</b>			
Transaction through CanadaHelps	\$2,695,505	\$2,813,890	4%
Other revenue	\$351,280	\$420,331	20%
<b>Total Revenues</b>	<b>\$3,046,785</b>	<b>\$3,234,221</b>	<b>6%</b>
<b>EXPENSES</b>			
Bank and credit card fees	\$1,467,354	\$1,547,013	5%
Other expenses	\$1,730,246	\$1,566,487	-10%
<b>Total Expenses</b>	<b>\$3,197,600</b>	<b>\$3,113,500</b>	<b>-3%</b>
<b>SURPLUS (DEFICIT)</b>	<b>-\$150,815</b>	<b>\$120,721</b>	

## CanadaHelps Revenues



## CanadaHelps Expenses



# Our Fee Structure

Overall Disbursement of Donations through CanadaHelps\*



CanadaHelps is a non-profit organization. Our mission is to increase charitable giving, and it's critical to our mission that we pass along as much as possible out of every dollar we collect.

Just 1.8% of your donation ensures CanadaHelps can continue to provide charities with affordable access to online fundraising and educational tools. You receive a tax receipt for 100% of the value of your donation. The charity receives the amount of your donation less our processing fee.

Like all online transactions, online charitable gifts are subject to transaction processing fees from banks, credit card companies and/or supporting brokerage firm. To ensure our fee structure is as simple and transparent as possible, our fees include the payment processing costs.

These are the fees we collect on donations:

	Donations to charities who use the CanadaHelps online fundraising platform	Donations to charities who use alternative, online fundraising tools
<b>Cash donations</b>	3.9% fee	4.9% fee
<b>Securities donations</b>	3.0% fee	4.0% fee

That's it. There are no hidden fees. There is also no charge to open a CanadaHelps account for donors.

*\* Depicts total disbursement breakdown for all donations made using CanadaHelps. As set out in the fees table above, the actual amount disbursed for a particular donation varies by type of donation and whether charity actively uses the CanadaHelps online fundraising platform.*

# Notes



## Our Commitment to Security and Privacy

Security and privacy for our donors and charities are CanadaHelps' top concern. Our site is built on one of the most respected web application platforms available, and is protected against unauthorized activity by robust hardware and software security systems.



## Top Level Security Compliance

CanadaHelps adheres to Payment Card Industry Data Security Standards (PCI DSS) when it handles all credit card information, including single and monthly donations, through our website or indirectly from a charity website. CanadaHelps respects the privacy of its donors and does not sell, trade, or share personal information.



## Management & Staff Compensation

CanadaHelps strives to be an employer of choice. As such, our objective is to hire and retain quality staff members, while carefully managing our donation dollars. Our staff salaries are fair and competitive, and we use similar organizations as a guideline for our compensation packages.

# 2012-2013 Financial Report



CanadaHelps is committed to responsible financial management. The Board of Directors and staff work together for the best interests of CanadaHelps and all of its stakeholders to protect the assets of CanadaHelps and to ensure that all financial matters are handled with care, integrity, consistency, and in accordance with all trust arrangement and funding agreements.

For the 2012-13 fiscal year, CanadaHelps implemented the requirements of the Canadian Institute of Chartered Accountant's Handbook and has adopted the Canadian Accounting Standards for Not-for-Profit Organizations. The adoption of the new standards had no impact on the previously reported financial statements of CanadaHelps. Accordingly, no adjustments were required in the comparative statements of financial statements, Income Statement or changes in net assets.

**STATEMENTS OF FINANCIAL POSITIONS  
AS OF JUNE 30, 2013, JUNE 30, 2012 AND JULY 1, 2011**

<b>ASSETS</b>	<b>June 30 2013</b>	<b>June 30 2012</b>	<b>July 1 2011</b>
Current assets			
Cash and short-term deposit	\$781,002	\$802,932	\$697,226
Accounts receivable	\$0	\$2,754	\$27,439
Harmonized sales tax recoverable	\$54,561	\$41,843	\$29,587
Prepaid expenses	\$21,381	\$29,770	\$13,917
	<hr/>	<hr/>	<hr/>
	\$856,944	\$877,299	\$768,169
Capital assets	\$126,560	\$95,203	\$81,416
Trust assets	\$1,694,297	\$989,248	\$1,166,285
	<hr/>	<hr/>	<hr/>
	<b>\$2,677,801</b>	<b>\$1,961,750</b>	<b>\$2,015,870</b>
<b>LIABILITIES</b>			
Current liabilities			
Accounts payable and accrued liabilities	\$71,068	\$78,406	\$55,793
Deferred revenue		\$95,000	\$52,500
	<hr/>	<hr/>	<hr/>
	\$71,068	\$173,406	\$108,293
Deferred lease inducement	\$16,603	\$23,984	\$31,365
Trust liability	\$1,694,297	\$989,248	\$1,166,285
	<hr/>	<hr/>	<hr/>
	\$1,781,968	\$1,186,638	\$1,305,943
<b>NET ASSETS</b>			
Unrestricted net assets	\$769,273	\$644,909	\$628,511
Invested in capital assets	\$126,560	\$95,203	\$81,416
Internally restricted reserve fund	\$0	\$35,000	-
	<hr/>	<hr/>	<hr/>
	\$895,833	\$775,112	\$709,927
	<hr/>	<hr/>	<hr/>
	<b>\$2,677,801</b>	<b>\$1,961,750</b>	<b>\$2,015,870</b>

**INCOME STATEMENT**  
**YEARS ENDED JUNE 30, 2013 AND 2012**

	2013	2012
Donations collected on behalf of other charities	\$71,998,994	\$62,505,607
<b>REVENUES</b>		
Transaction fees	\$2,813,890	\$2,453,394
Other donations	\$233,592	\$254,311
Corporate donations and sponsorships	\$9,221	\$34,866
Grants from foundations	\$95,000	\$20,000
MyCharityConnects program	\$0	\$111,511
Interest	\$34,230	\$16,696
Other income	\$48,288	\$33,310
	<b>\$3,234,221</b>	<b>\$2,924,088</b>
<b>EXPENSES</b>		
Bank charges and credit card fees	\$1,547,013	\$1,333,889
Staffing costs	\$1,037,732	\$890,843
Marketing and MyCharity Connects program	\$48,972	\$177,104
Professional and consulting fees	\$187,867	\$182,627
Rent and occupancy costs	\$112,434	\$119,761
Office supplies and expenses	\$88,058	\$83,036
Other expenses	\$38,300	\$37,086
Amortization of capital assets	\$53,124	\$34,557
	<b>\$3,113,500</b>	<b>\$2,858,903</b>
<b>Excess of revenues over expenses for the year</b>	<b>\$120,721</b>	<b>\$65,185</b>

# Governance Report

## CanadaHelps Board of Directors

**Patrick Johnston, Chair**  
Borealis Advisors, Toronto

**William Kerr, Past Chair**  
JSE Partners Inc., Oakville

**John Beattie**  
TELUS Communications, Toronto

**Michael Bradley**  
Visa Canada, Toronto

**Matthew Choi, Secretary**  
Physician, Hamilton

**Brenda Gainer**  
Schulich School of Business,  
York University, Toronto

**Karim Harji**  
Venture Deli, Toronto

**Joan McCalla**  
Director and Distinguished Fellow,  
Cisco Systems, Toronto

**Sue Tomney**  
YWCA of Calgary, Calgary

**Sean Van Doorselaer, Treasurer**  
Lind Equipment Ltd, Toronto

**Deryck Williams**  
Grant Thornton, Toronto

## Governance Committee

Meeting quarterly, the Governance Committee oversees the governing affairs of **CanadaHelps**, working to improve the work and function of the Board of Directors and ensure alignment with the mission and vision of **CanadaHelps**, nominates candidates for the Board, and acts as a review and selection committee for chief executive management.

**Members:** Brenda Gainer (Chair), John Beattie, Patrick Johnston, Joan McCalla, Sue Tomney, Karim Harji

## Finance and Audit Committee

Meeting quarterly, the Finance and Audit Committee oversees the financial affairs of **CanadaHelps**, receives the initial report from the auditor, and works with the executive management of **CanadaHelps** on the strategic allocation of financial resources in executing the mission of the organization.

**Members:** Sean Van Doorselaer (Chair), Michael Bradley, Matthew Choi, Patrick Johnston, Deryck Williams, William Kerr

# Our Partners & Supporters

CanadaHelps works with a number of partners to provide unique and innovative donation opportunities to both donors and charities.

CanadaHelps would like to thank all of the individuals, corporations, and foundations who have generously provided financial and in-kind support to CanadaHelps.



**PROUD PARTNER OF**  
**ALBERTA'S PROMISE**  
[www.albertaspromise.org](http://www.albertaspromise.org)

Alberta's Promise uses CanadaHelps to link donors to their list of charities benefiting children and youth in Alberta.



CanadaHelps works in partnership with Imagine Canada on several initiatives, including the Ethical Fundraising and Financial Accountability Code, CharityFocus, and other initiatives that benefit the nonprofit sector.



Intuit's QuickTax program allows donors through CanadaHelps to easily download their e-tax receipts.



Maritz provides CanadaHelps Gift Cards to its various clients' loyalty programs.



McMaster University is working with CanadaHelps to better understand Canadian donors and their motivations for giving.

# CanadaHelps Staff as of June 30, 2013

**Marina Glogovac**  
President & CEO

**Patrick Banville**  
Chief Operating Officer

**Kirstin Beardsley** (*on leave*)  
Marketing & Communications Manager

**Dina Bilenkis**  
Database & Systems Administrator

**Marco Dezi**  
Executive Assistant

**Lyne Girizina-Kabwa**  
Charity and Donor Services Associate

**Amy Huynh**  
Marketing & Communications Coordinator

**Nadine Gutmann**  
Charity & Donor Services Team Lead

**Konstantin Rakitine**  
Web Application Developer

**Ren Ramkhelawan**  
Systems Architect

**Ken Waugh**  
Technical Director

**Adeline Wong**  
Software Engineer



**CanadaHelps**

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